APPOINTMENT STANDARDIZATION

at

Naval Hospital Camp Pendleton

Michelle Troupe
Health Systems Specialist
Managed Care Directorate
(760) 725-1587 DSN 365

AGENDA

- Goals
- Background
- Implementation Steps
- Lessons Learned
- Issues

GOALS

- **IMPROVE APPT**
  - **BOOKING**
  - **SCHEDULING**
  - **ACCESS** (WALK-IN, TELEPHONE, WEB)
- **ENSURE RIGHT**
  - PATIENT, PROVIDER, LOCATION,
  - AT THE RIGHT TIME
- **ENSURE PATIENT SATISFACTION**

BACKGROUND

- OTHER MTF REVIEWS (1996-1997)
- REGION 2 SITE VISIT (OCT 97)
  - NAVAL HOSPITAL PORTSMOUTH
  - LEAD AGENT
- SIGNED NHCP POLICY LETTER (JUN 99)
- RECEIVED TMA INQUIRY (AUG99)

IMPLEMENTATION
(OCT 99)

- EXECUTIVE STEERING COMMITTEE
  - APPT & ACCESS PLAN
- DRAFTED WORKING GROUP CHARTER
- STANDARD APPT & ACCESS WORKING GROUP (SATAWG)
  - CHAIRMAN (PROVIDER) - PCM BUSINESS MGRS
  - CHCS ADMIN - MEPRS SUPERVISOR
  - ADS COORDINATOR - MANAGED CARE SPECIALISTS
  - SUPER USERS - BOOKING CLERKS

IMPLEMENTATION (Cont.)

- **STANDARDIZED APPT TYPES**
  - **REDUCED 474 TO 10**
  - **MEPR B CLINICS & APU APPTS**
- **MAPPED APPTS TO ACCESS STANDARDS**
- **MAPPED APPTS TO ADS OVERLAYS**
- **MANDATED MCP BOOKING**

IMPLEMENTATION (Cont.)

- TRAINING - MCP BOOKING **(LESS MCP REFERRAL)**
  - **APPX. 200 TRAINED (MAR - JUL 99)**
    - **TRAING EMPHASIZED :**
      - **DEMOGRAPHIC UPDATES**
      - **USE OF MCP TO ENSURE AUTOMATIC DEERS CHECK**
        - **PAS BOOKING**
        - **MCP BOOKING**
        - **MCP REFUSAL DOCUMENTATION**

IMPLEMENTATION (Cont.)

- **TRAINING**
  - **APPT CHANGE, JOIN OR SPLIT FUNCTION**
  - **ALTERNATE CARE VALUES (I.E. ACTIVE DUTY, PRIME, TRICARE STANDARD, MEDICARE, ETC.)**
  - **ACCESS STANDARDS**
  - **ENROLLMENT ELIGIBILITY**
  - **MEPRS VISIT DEFINITION**
  - **COUNT & NON-COUNT WORKLOAD**
  - **CHCS END-OF-DAY PROCESSING**
  - **CHCS & ADS MATCH FORMULA**
  - **UNIT & DMIS IDENTIFICATION NUMBERS**
  - **ENROLLMENT BASED CAPITATION IMPACT**

IMPLEMENTATION (Cont.)

- **CONDUCTED PILOT TESTS**
  - **FAMILY MEDICINE**
  - **31 AREA BRANCH MEDICAL CLINIC**
  - **NACC PORT HUENEME**
  - **DERMATOLOGY**
- **SAIC TRAINING - MCP REFERRAL & ATC CODING W/CHCS 4.603 UPGRADE (JUN 00)**
  - **APPX. 95 TRAINED**
- **MCP REGIONAL TRAINING AT CAMP PENDLETON**
  - **103 TRAINED**

BOOKING CLERKS - MCP Booking, SUPER USERS - MCP File and Table Build, PROVIDERS - MCP Consult Tracking)

IMPLEMENTATION (Cont.)

- **IMPLEMENTED LOCAL POLICY LETTER (16 JUN 99)**
  - **OUTLINES** APPT TYPES, ACCESS STANDARDS, APPT TIMES, AND DEPT/CLINIC MEMOS
  - **REQUIRES CHANGE MEMOS** TO UPDATE INITIAL DEPARTMENT/CLNIC MEMOS
- **ESTABLISHED ACCESS MEASUREMENT PROCESS**
  - **APPT ANALYZER**
    - MTF, DIRECTORATE, CLINIC LEVEL REPORTS & CHARTS
    - SPECIAL REPORTS

IMPLEMENTATION (Cont.)

- **REVIEWED CHCS CLINIC & PROVIDER PROFILES**
- **CONDUCTED ON-SITE CLINIC ASSIST VISITS**
- **PROVIDED DIRECTORATES W/ PROGRESS REPORTS ON APPT CHANGEOVER**

IMPLEMENTATION (Cont.)

- **TMA APPT TYPE SYSTEM CHANGEOVER (30 SEP00)**
  - **NO SYSTEM DIFFICULTIES**
  - **CHCS ADMINISTRATOR**
    - ADDED APPT TYPES TO CHCS MASTER APPT LIST & CLINIC PROFILES
      - CORRECT OLD ROU TYPES TO ROUT AND EST1 TO EST
      - OLD DTAIL FU APPT REMAIN IN SCHEDULE UNTIL BOOKED OR EXPIRED IN SYSTEM
      - CHANGE DTAIL FU APPT TYPES IN TEMPLATES TO EST OR ANOTHER TYPE REQUIRED IN FUTURE SCHEDULES
  - **ADS COORDINATOR**
    - TIED NEW/CHANGED APPT TYPES TO ADS OVERLAYS EVERY CLINIC
  - **CLINICS**
    - ADJUST NEW SCHEDULES APPROPRIATELY

IMPLEMENTATION (Cont.)

- **REPORTS**
  - **CLNIC TEMPLATE ANALYSIS TOOL REPORTS (WEEKLY)**
  - **NHCP ACCESS MEASUREMENT REPORT (MONTHLY)**
  - **MCP/PAS BOOK AUDIT REPORT (MONTHLY)**
    - PCM/SPECIALTY CARE CLINICS & APUs
      - LEAD AGENT
      - XO/CO/DIRECTORS
      - CLINIC ACCESS POCs

NEXT STEPS

- **CHARTER "NEW "APPT TYPE GROUP TO:**
  - **STANDARDIZE**
    - CLINIC SCHEDULE MANAGEMENT PROCESSES & APPT TIMES
  - **REVIEW**
    - FOLLOW-UP APPT PROCEDURES, CORRECT MIX & NUMBER OF APPTS & DEMAND MANAGEMENT
    - REGION 11's CHCS TRAC 1, 2, 3 METHOD
  - **INCLUDE SEASONAL REQUIREMENTS**
  - **MODIFY PROVIDER SCHEDULES**
    - FROM 30 TO 60 "ROLLING" DAYS
    - CHANGE WORK HOURS TO 0730 -1800 (MON-FRI)

NEXT STEPS (Cont.)

- **UPDATE CHCS MASTER LIST OF APPT TYPES**
- **OBTAIN ADHOCS**
  - MCP FILE & TABLE FLAG REPORT
  - PAS & MCP FREE TEXT FIELD REPORT
- **WORK TO SIMPLIFY MCP REFERRAL BOOKING**
- **LOOK AT DEMAND MANAGEMENT ISSUES**
- **IMPLEMENT WEB BASED APPOINTING**
- **KEEP BUTTS OUT OF WAITING ROOM CHAIRS**

LESSONS LEARNED

- **REDUCED APPTS LED TO REDUCED ADS FORMS**
- **INCREASED ACUTE APPT AVAILABILITY**
- **LESS APPT TYPES MORE EFFICIENT**
- **BOOK APPTS CORRECTLY AT FIRST - NOT AT END-OF-DAY**
- **BOOK ACCESS CODE TO APPT TYPE**
- **USE OF “GENERIC” PLACEHOLDER IS ADDED BENEFIT TO SOME CLINICS**
- **IMPROVED CHCS DATA QUALITY**

ISSUES

- **PROVIDER CLINIC TEMPLATE/SCHEDULE REVISIONS**
  - LABOR INTENSIVE (38 MANHOURS FOR 50 PROVIDERS)
- **NONMEDICAL APPT CLERKS**
  - MATCH PATIENT NEEDS TO APPT TYPE/ACCESS STANDARD
- **GS BOOKING CLERK POSITION DESCRIPTIONS**
  - ADD CONSULT & ENROLLMENT RESPONSIBILITIES IN CENTRAL APPTS
- **DEPARTMENT/CLINIC MEMOS**
  - FORWARDED TO MANAGED CARE & CENTRAL APPTS
- **SHARED CHCS PLATFORM & SERVER**
  - COORDINATE BETWEEN HOST & MTFs

ISSUES (Cont.)

- **TRAINING MATERIALS** UP-TO-DATE & STAFF TRAINED IN MCP BOOKING/FILE & TABLE PROCESSES
- **TRAIN CLERKS** DMIS ID 6909 = PRIME NETWORK PROVIDER
- **IS NEW (ACUTE) PT APPT** BOOKED AS ACUTE OR PCM (NEW)? (ACUTE & RETURN TO PCM FOR NE W PT FU)
- IS NEW (WELL) PT APPT FOR PAPs, PHYSICAL EXAMS BOOKED AS PCM (NEW) OR WELL? (NEW OR WELL)
- **CLARIFY WORKLOAD** (COUNT/NON-COUNT) AT TMA LEVEL
- **TIE MCP REFUSED APPOINTMENTS & DUPLICATE APPTS TO ACCESS TO CARE REPORT PROCESS**
- **MCP FILE/TABLE IS COMPLETED** FOR PCM & SPECIALTY CARE CLINICS

ISSUES (Cont.)

- **CREATE STANDARD & ADHOC REPORTS PROCESS**
  - APPT UTILIZATION & DEMAND MANAGEMENT
- **DETERMINE NEW ALTERNATE CARE VALUES (ACVs)**
  - IN NED & MODIFY CHCS GS ADHOCS
- **RESOLVE MCP CONSULT TRACKING/REFERRAL ISSUES, I.E.**
  - TOO MANY STEPS
  - INPUT, REVIEW, BOOK AND RESULT PROCESS
  - CHCS ADMIN MESSAGES

APPOINTMENT/ACCESS STANDARDS

APPOINTMENT TYPE(TMA)	APPOINTMENT TYPE(NHCP)	APPOINTMENT TYPE DEFINITION	TEMPLATE PATIENT STATUS CODE	APPLICABLE APPOINTMENT TYPE ACCESS STANDARD
PCM	NEW			30 DAYS
ROUT	NPRB			1-7 DAYS
EST	BRIEF/ DTAIL			NONE
ACUT	ACUTE			24 HOURS
SPEC	CONS			30 DAYS
WELL	HMNT			30 DAYS
PROC	PROC			30 DAYS
GRP	GROUP			NONE
CHCS SYSTEM GENERATED:				
T.CON*	T.CON*			NONE
APV	APV			24 HOURS
N-MTF	N-MTF			NONE